



## **Senior Finance & Tax Analyst (Senior Family Office Advisor)**

The **Senior Finance & Tax Analyst** assists and collaborates with Family Office Directors and Managers in the overall management of assigned client base. Primary responsibilities include overseeing projects and schedules, supervising client service teams, reviewing staff deliverables, and managing relationships with client base and/or family staff teams.

### **Essential Duties and Responsibilities include:**

- Acts as a point of contact and center of knowledge for assigned clients in the absence of the Director/CEO by developing a familiarity with assigned family histories and habits, as well as a comprehensive understanding of all aspects of the assigned families' service needs
- Proactively meets with the Director/CEO to keep him/her informed of the status of all projects including budget, timing and other issues as they arise; works with the Director/CEO on finding ways to reduce overhead and write-offs on client assignments
- Takes ownership of projects and assignments and performs complex research as needed
- Organizes, prioritizes, understands and effectively delegates work to staff; is a resource in answering questions and solving problems
- Supervises and reviews simple and complex tax returns and projects of assigned staff members, ensuring timely completion; prepares and reviews returns for submission to the Director/CEO for final review with a high level of accuracy
- Develops training and acts as an instructor for the staff; oversees procedural enhancements in technical area of focus; Seeks out ways in which the firm may develop and produce future leaders by participating in the development and teaching of internal courses
- Prepares and/or oversees preparation of monthly or quarterly client bills for review by Director/CEO
- Commits to personal self-improvement training in effective communication, improved delegation skills, engaging presentation skills, and technical knowledge
- Serves as a role model for staff members by demonstrating a positive attitude, a willingness to make personal sacrifices to meet client needs, and by fostering a team environment
- Coaches staff members to integrate thinking and actions across multiple disciplines including taxation, financial planning, business structuring, estate planning and investments
- Takes a leadership role in support of trainers of new staff members

### **Supervisory Responsibilities**

Regularly supervises two or more firm members. Carries out supervisory responsibilities in accordance with the organization's policies and applicable laws. Responsibilities include interviewing, hiring, and training employees; planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems.

### **Qualifications**

Must be CPA-eligible; CPA certification desired. Bachelor's degree in accounting or other major with tax and accounting coursework. Minimum of three years preparing and one year reviewing all types of tax returns with a public CPA firm or private company.

### **Computer Skills**

To perform this job successfully, an individual should have knowledge of Quickbooks; Microsoft Outlook, Excel and Word. Knowledge of the following specialty software packages is highly desirable: ProSystem Tax; BNA Income Tax Planner and Depreciation Solutions, Visual Practice Management and the ability to learn other software packages as needed.

### **Personal Attributes**

- Leadership and decision making ability
- Teamwork orientation
- Ability to think creatively
- Learns and adapts quickly to change; a problem solver
- Excels under pressure in a continuously changing, fast-paced environment
- Excellent written, verbal and interpersonal skills
- Action-oriented, exhibits sense of urgency in all work
- Ability to successfully multi-task in a fast-paced environment
- Internally driven to succeed, has a passion for the field and takes pride in work
- A detail-oriented self-starter with customer service orientation; takes initiative
- Maintains composure and a professional demeanor at all times; is a calming influence can diffuse high-tension situations comfortably; uses diplomacy and tact effectively
- Practices attentive and active listening
- Uses his/her time effectively and efficiently; values the time of others

### **Language Skills**

Ability to read and comprehend simple instructions, short correspondence, and memos. Ability to write simple correspondence. Ability to effectively present information in one-on-one and small group situations to clients, and other employees of the organization.

### **Mathematical Skills**

Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, area, circumference, and volume. Ability to apply concepts of basic algebra and geometry.

### **Reasoning Ability**

Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

**Physical Demands** The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this Job, the employee is regularly required to talk or hear. The employee is frequently required to sit; use hands to finger, handle, or feel and reach with hands and arms. The employee is occasionally required to stand; walk; climb or balance and stoop, kneel, crouch, or crawl. The employee must occasionally lift and/or move up to 10 pounds. Specific vision abilities required by this job include close vision and ability to adjust focus.

**Work Environment** The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

*The intent of this position description is to provide a representative summary of the major duties and responsibilities performed by incumbents of the position. Incumbents may be required to perform other job-related tasks other than those specifically presented in this description.*